



Ipsos Public Affairs



Transportation Network Companies

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Background and objectives

- City Council has directed the Chief Municipal Law Enforcement Officer to review the operations of vehicle-for-hire services, such as UberX, including the views of the public with respect to the regulation of these services.
- As part of this review, research is desired in order to garner this information.
- The City of London commissioned Ipsos to conduct a survey of its residents to measure:
 - Familiarity with Uber X and other transportation services;
 - Frequency of usage of Uber X and other transportation services;
 - Satisfaction with Uber X and other transportation services; and
 - Support for regulation of vehicle-for-hire services

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Methodology

- This survey was conducted by telephone and the sample was drawn using random digit dialing (RDD) among City of London residents.
- A total of 500 interviews were completed among residents 18 years of age and older.
- The overall survey results have been weighted by age and gender to reflect the population of the City of London.
- A sample of 500 interviews produces results which can be considered accurate within ± 4.4 percentage points, 19 times out of 20. The margin of error will be larger for subgroups.
- This survey was conducted between May 11 and 21, 2016.

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Key findings

- Just under one in ten City of London residents (7%) have used UberX service in the past 12 months, and three in ten (31%) use this service at least once a month. Comparatively, four in ten (42%) have taken a taxi in the past 12 months and three in ten have used the service at least once a month (28%).
- While residents are less likely to have used UberX compared to taxis, those who do use UberX are marginally more likely to use it more frequently; two in ten UberX users take it weekly (17%) compared to one in ten taxi users who use taxis weekly (10%).
- Satisfaction with UberX is marginally higher than that for taxis (21% of UberX users are satisfied compared to 16% among taxi users).
- When asked to choose among three options the action the City of London should take regarding vehicle-for-hire services, such as UberX, a majority of two-thirds (64%) prefer that the City regulate drivers of vehicles-for-hire in the same way the City regulates drivers of taxis and limousines. Only two in ten (18%) think drivers of private vehicle-for-hire services should be allowed to operate under different regulations than drivers of taxis and limousines. Only one in ten (12%) think that the City should not permit these drivers to operate in the City of London.
- London residents are most inclined to support regulation of all vehicle-for-hire services that aim to protect passenger safety, including primarily criminal record checks and vehicle safety checks, as well as Ministry of Transportation driving record, safety emergency flashing lights, cameras in vehicle for driver and passenger safety and commercial insurance.

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Key differences by age

- Usage of public transit, taxis and UberX is significantly higher among younger residents.
- When asked to choose among three options the action the City of London should take regarding vehicle-for-hire services, such as UberX, a majority of two-thirds of residents across all age groups prefer that the City regulate drivers of vehicles-for-hire in the same way the City regulates drivers of taxis and limousines. But those aged 18 to 34 are significantly more likely than those aged 55 and older to think drivers of private vehicle-for-hire services should be allowed to operate under different regulations than drivers of taxis and limousines, while those aged 55 and older are significantly more likely than those aged 18 to 34 to think that the City should not permit these drivers to operate in the City of London.
- Younger residents are as likely as older residents to support regulation of all vehicle-for-hire services that aim to protect passenger safety, including criminal record checks and vehicle safety checks, as well as Ministry of Transportation driving record, safety emergency flashing lights, and cameras in vehicle for driver and passenger safety (with majorities across all age groups voicing strong support for regulation in these areas). They are also as likely to strongly support regulation of customer service training, collection of HST through the fare and fares themselves. Those aged 18 to 34 are significantly less likely than those aged 55 and older to strongly support the City regulating the number of permitted vehicles, markings on vehicles to identify private vehicles-for-hire, commercial insurance, and collection of HST through the fare.

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Key differences by taxi and UberX* users

- A large majority of past 12 month UberX users are also taxi users, while few past 12 month taxi users have also used UberX.
- When asked to choose among three options the action the City of London should take regarding vehicle-for-hire services, such as UberX, past 12 month UberX users are significantly more likely than past 12 month taxi users to prefer that drivers of private vehicle-for-hire services should be allowed to operate under different regulations than drivers of taxis and limousines (with half strongly supportive of this view), while past 12 month taxi users are significantly more likely than past 12 month UberX users to prefer that the City regulate drivers of vehicles-for-hire in the same way the City regulates drivers of taxis and limousines (with a majority strongly supportive of this view).
- Past 12 month UberX users are as likely as past 12 month taxi users to support regulation of all vehicle-for-hire services in most areas dealing with passenger safety, such as criminal record checks, vehicle safety checks, Ministry of Transportation driving record and safety emergency flashing lights, as well as customer service training and exams and fares. But past 12 month UberX users are significantly less likely to strongly support regulation in the areas of cameras in vehicles for driver and passenger safety, as well as in the areas of number of permitted vehicles, markings on vehicles to identify private vehicles-for-hire, commercial insurance, and collection of the HST through the fare.

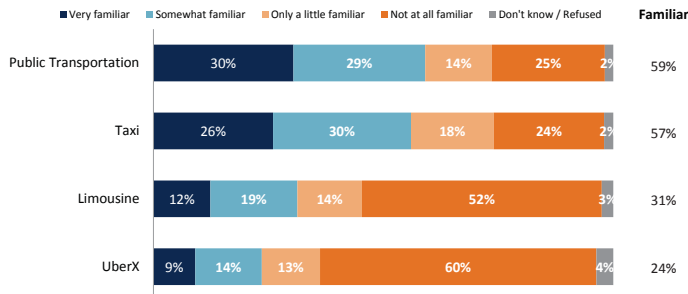
* The sample of UberX users is small (n=35). Hence, caution should be used in interpreting these results.

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Familiarity with transportation services

- Almost six in ten residents feel familiar (very/ somewhat) with public transportation and taxis.
- Three in ten are familiar with limousines and one-quarter with UberX.



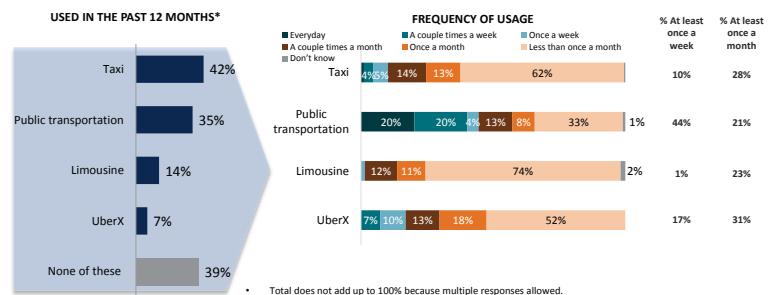
QT1. How familiar would you say that you are with the following types of transportation in the City of London?
Base All Respondents n=500

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Usage and frequency of transportation services

- Four in ten residents have used a taxi in the past 12 months, while about a third have used public transportation, more than one in ten have used a limousine and fewer than one in ten have used UberX.
- Among users, more than four in ten use public transit at least once a week, while nearly two in ten use UberX at the same frequency.
- One in ten use taxis on a weekly basis and only one percent use limousines at least once a week.



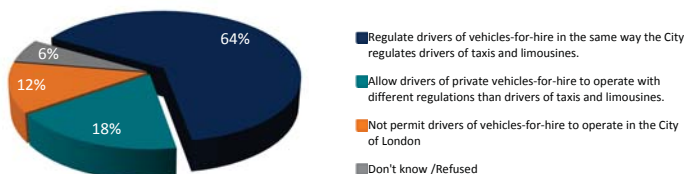
QT2. Which, if any of the following types of transportation have you used in the City of London in the past 12 months? Base All Respondents n=500
QT3. How often, on average, have you used the following types of transportation in the past 12 months? Base: varies

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Preferred Action by City on vehicle-for-hire services

- Residents were given some information (see question wording below) regarding the City's regulation of taxis and limos. They were also told that since mid-2015 in London, drivers have been using their own personal vehicles-for-hire and through a smart phone app (Uber) been connecting to people who need rides, and that these vehicle-for-hire services are regulated by UberX.
- Residents were asked to choose among three options what they think the City of London should do when it comes to vehicle-for-hire services, such as Uber.
- Two-thirds think the City should regulate drivers of vehicles-for-hire in the same way the City regulates drivers of taxis and limousines. Much smaller proportions prefer that the City should allow drivers of private vehicles-for-hire to operate with different regulations than drivers of taxis and limousines or not permit drivers of vehicles-for-hire to operate in the City of London.



As you may know, the City of London regulates taxi and limousine services for purposes of public safety and consumer protection. This means that these services require a license to operate and must meet certain criteria, including driver training, vehicle safety inspections, criminal record checks and commercial insurance. The City also regulates fares. Since mid-2015 in London, drivers have been using their own personal vehicles-for-hire. The drivers have been using a smart phone app (Uber) that connects people who need rides with drivers willing to provide them. UberX, through a third party, undertakes driver criminal record checks and drivers must submit to a vehicle safety check. UberX vehicles cannot be older than 10 years. UberX regulates its own fares which are shared with its customers via its phone app.

T4. When it comes to vehicle-for-hire services, such as Uber, do you think the City of London should...?

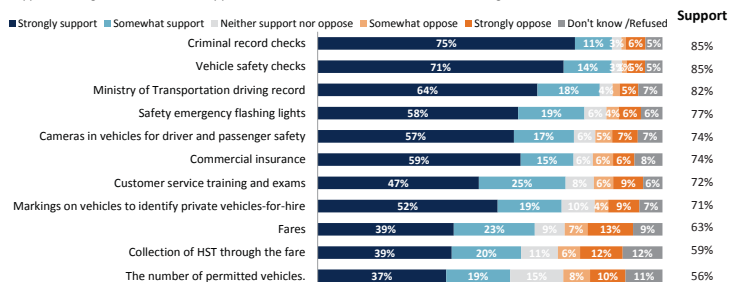
Base All Respondents n=500

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Support for regulation of vehicle-for-hire services

- Residents were asked their support for various regulation if vehicle-for-hire services, such as Uber, are allowed to operate in the City of London.
- At three-quarters of residents, the vast majority 'strongly support' criminal record checks for drivers, followed by seven in ten for vehicle safety checks and two-thirds for Ministry of Transportation driving record. About six in ten 'strongly support' safety emergency flashing lights, cameras in vehicles for driver and passenger safety and commercial insurance. About half 'strongly support' markings on vehicles to identify private vehicles-for-hire and customer service training and exams.



T5. If vehicle-for-hire services, such as Uber, are allowed to operate in the City of London, would you say you strongly support, somewhat support, neither support nor oppose, somewhat oppose or strongly oppose the City playing a role in administering and enforcing the following regulations on these services?

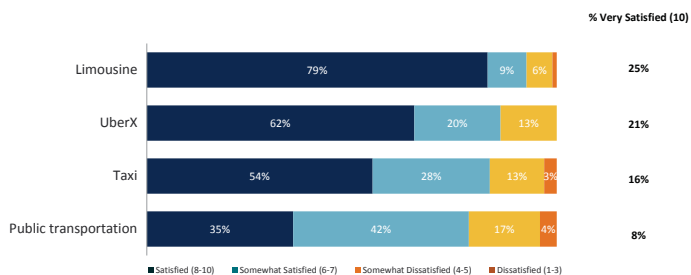
Base All Respondents n=500

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Satisfaction with transportation services

- At eight in ten, satisfaction among Limousine users is highest of all. Six in ten of UberX users are satisfied, while just over half of taxi users are satisfied. One-third of public transportation users are satisfied.



T6. Overall, how satisfied would you say that you are with

Base Have used services n=Varies

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